

# MUNICIPAL SCHEDULE

**STANDARD** Public Transportation Records

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**RECORDS SERIES TITLE****DISPOSITION INSTRUCTIONS****CITATION**

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**Accreditation Records (Public Transportation)**

Destroy in office 1 year after superseded.\*

Records concerning compliance with those standards outlined by accreditation programs.

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**Agency Logs (Sheets)**

Destroy in office after 3 years.\*

Records concerning individual agency ridership.

49 CFR 18.42

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\*See AUDITS, LITIGATION AND OTHER RELATED RECORDS in introduction

RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
<b>Application for Awards</b>  Applications and supporting documentation used to apply for various public and private awards.	Destroy in office when administrative value ends.	
<b>Applications for Art-In-Transit</b>  Application and supporting documentation submitted by regional and national artists on agency property.	Destroy in office when administrative value ends.	
<b>Applications for Discount Passes</b>  Applications, certificates of disability, and supporting documentation used to apply for discount passes.	Destroy in office 3 years after service is terminated or denied.	Refer to U.S. Privacy Act 5 U.S.C. 552a for information on confidentiality of patient medical information.

**RECORDS SERIES TITLE**

**DISPOSITION INSTRUCTIONS**

**CITATION**

**Applications for Transit Service**

Destroy in office 3 years after service is terminated or denied.

Customer applications, eligibility assessment records, correspondence, health information, riders' guides, and related records.

**Call in Logs (Sheets)**

Destroy in office after 5 years.\*

Records concerning on-demand service requests.

49 CFR 18.42

**Customer (Rider) Alerts**

Destroy in office when administrative value ends.

Records alerting customers of changes in regular service (i.e. detours, festivals, parades, etc.).

\*See AUDITS, LITIGATION AND OTHER RELATED RECORDS in introduction

**RECORDS SERIES TITLE**

**DISPOSITION INSTRUCTIONS**

**CITATION**

**Customer (Rider) Identificaiton Records**

Destroy in office when administrative value ends.

Records concerning customer identification, approvals, denials, and related information.

**Departure Records**

Destroy in office after 1 year.

Includes logs, sheets, reports, and similar records documenting vehicle arrivals and departures.

**Disadvantaged Business Enterprise (DBE) Records**

a) Destroy in office 5 years after company is removed from certified list.

Files contain company's articles of incorporation, financial statements, signed affidavits, letters of reference, declarations, Federal Schedule A or B, and related correspondence.

b) Destroy in office related DBE program records, including Federal Transit Administration reports 5 years from date record was created.

49 CFR 26

**RECORDS SERIES TITLE**

**DISPOSITION INSTRUCTIONS**

**CITATION**

**Dispatch Records**

Destroy in office after 5 years.

Reports, logs, and similar records used to document dispatch activities.

49 CFR 18.42

**Lost and Found Records**

Destroy in office when administrative value ends.

Logs, sheets, and similar records documenting items recovered from agency facilities and vehicles.

May include customer receipts for claimed items.

**Marketing and Promotional Records**

a) Retain in office records with historical value permanently.

Reference copies relating to agency promotion.

b) Destroy in office project records 5 years after project was completed.

49 CFR 18.42

c) Destroy in office remaining records when reference value ends.

**RECORDS SERIES TITLE****DISPOSITION INSTRUCTIONS****CITATION****National Transit Database (NTD) Report**

Destroy in office after 5 years.\*

Annual report submitted to the Federal Transit Administration and used as the basis for calculating each systems' funding.

May include records(data) used to generate reports regardless of format.

49 CFR 18.42

**Operator Accident/Incident Reports**

See Accident/Incident Reports (Customer and Employee)  
under the Risk Management Records standard.

**Operator Bid Records**

Destroy in office when administrative value ends.

Cards, sheets and similar records documenting operators' route selections and choice for a service period.

\*See AUDITS, LITIGATION AND OTHER RELATED RECORDS in introduction

**RECORDS SERIES TITLE****DISPOSITION INSTRUCTIONS****CITATION****Operator Observation Records**

See Employee Performance Review File under the Personnel Records standard.

Records concerning monitoring operators' work performance.

**Operator Scheduling and Assignment Records**

Destroy in office when administrative value ends.

Logs, sheets, schedules, reports, and similar records used to track work assignments and activities of individual operators to routes and shifts.

See also TIME SHEETS, CARDS, AND ATTENDANCE RECORDS in Budget, Fiscal and Payroll Records standard.

**Operator Shift Inspection Records**

Destroy in office after 5 years.

Reports and similar records of operator's inspections of vehicles at the beginning and end of shift.

49 CFR 18.42

RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
<b>Paratransit Manifests</b>  Driver's daily assignments of passenger pick-ups and drop-offs.	Destroy in office after 5 years.	49 CFR 18.42
<b>Radio Dispatch Recordings and Logs</b>  Recordings and logs of dispatch messages to and from transit operators.	Destroy in office after 90 days.*	
<b>Ridership Reports</b>	Destroy in office after 5 years.	49 CFR 18.42

\*See AUDITS, LITIGATION AND OTHER RELATED RECORDS in introduction



RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
<b>Route History Records</b>  Includes descriptions of routes, bus stops, passenger lists and other related records.	Destroy in office when administrative value ends.	
<b>Route Maintenance Records</b>  Logs, sheets, and related records used to record needed road improvements.	Destroy in office when administrative value ends.	
<b>Seat Belt and Restraint System Records</b>  Records concerning the use and installation of seat belts and other restraint systems in vehicles.	Destroy in office when administrative value ends.	

\*See AUDITS, LITIGATION AND OTHER RELATED RECORDS in introduction

**RECORDS SERIES TITLE**

**DISPOSITION INSTRUCTIONS**

**CITATION**

**Service Change Records**

Records concerning changes in routes and transportation services offered by the agency.

a) Retain in office records with historical value permanently.

b) Destroy in office 3 years after records were created or project ends, whichever occurs last.

**Service Performance Records**

Records concerning quality control performance checks conducted on agency staff, contractors, and vendors.

a) Retain in office records with historical value permanently.

b) Destroy in office 3 years after records were created or project ends, whichever occurs last.

**Service Planning and Development Records**

a) Retain in office records with historical value permanently.

b) Destroy in office 3 years after the project ends.

**RECORDS SERIES TITLE****DISPOSITION INSTRUCTIONS****CITATION****Shelter Records**

Destroy in office when administrative value ends, or when site is no longer used, whichever occurs first.

Includes adopt a shelter program records, listings of shelter sites, site permission for right of way, easements and related documentation.

**Shuttle Logs (Sheets)**

Destroy in office after 5 years.\*

Records concerning regularly scheduled individual ridership.

49 CFR 18.42

**Terminal Dispatch Records**

Destroy in office after 1 year.

Reports, logs, and similar records used to track daily terminal operations and activities.

\*See AUDITS, LITIGATION AND OTHER RELATED RECORDS in introduction

**RECORDS SERIES TITLE****DISPOSITION INSTRUCTIONS****CITATION****Ticket Consignment Records**

Destroy in office when administrative value ends.

Logs, notebooks, and related records used to track tickets and passes provided to customers.

**Transit (Bus) Schedules**

Destroy in office when administrative value ends.

Printed route schedules and related information used to generate schedules.

**Transportation System Operations Reports**

Destroy in office after 5 years.

Reports and supporting records summarizing transit system operations.

49 CFR 18.42

## RECORDS SERIES TITLE

## DISPOSITION INSTRUCTIONS

## CITATION

## Transportation System Service Performance Evaluations

Destroy in office after 1 year.

## Transportation System Statistical Records

Records and supporting records showing passenger trips, mileage, service hours, on-time performance, missed and/or late trips, road call, ridership, and similar statistical information.

a) Retain in office records with historical value permanently.

b) Destroy in office 5 years after projects ends.

49 CFR 18.42

## Trip Requests

Passaenger trip requests.

Destroy in office after 5 years.

49 CFR 18.42

**RECORDS SERIES TITLE**

**DISPOSITION INSTRUCTIONS**

**CITATION**

**Vanpool Driver Applications**

Destroy in office 3 years after person leaves the program.

Applications and supporting records submitted by persons operating vanpool vehicles.

**Vanpool Monthly Usage Reports**

Destroy in office after 5 years.

Includes logs, sheets, reports and similar records documenting starting and ending mileage, total miles driven, route locations, passenger rosters, and similar information.

49 CFR 18.42

**Vehicle Breakdown Records**

Destroy in office after 1 year.

Reports and similar records documenting response time, location, vehicle identification and similar information.

See also WORK ORDERS (Vehicle Repair) in Administration and Management Records standard.

**RECORDS SERIES TITLE**

**DISPOSITION INSTRUCTIONS**

**CITATION**

**Vehicle Operator Instructions**

Destroy in office when administrative value ends.

**Vehicle Usage Logs (Sheets)**

Destroy in office after 1 year.\*

Includes date vehicle was used, pick-up and delivery locations, starting and ending mileage, total miles driven and signature of driver.

\*See AUDITS, LITIGATION AND OTHER RELATED RECORDS in introduction